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ABSTRACT

This paper presents the findings of a 1982 survey of members of the Association of American University Presses and other American book publishing firms with a net worth of of $500,000 or more. A low survey response rate of 25 percent is noted. Survey findings are reported as follows: (1) acid-free paper is used by 65 percent of respondents; (2) of university presses, 85 percent seriously consider preservation in production decisions, but only 39 percent of the other publishers do so; (3) only 25 percent of respondents use groundwood paper; (4) acid-free paper is considered less expensive than other paper by 57 percent of respondents; (5) a willingness to identify the use of acid-free paper in a statement on copyright pages is indicated by 61 percent of publishers; and (6) only 32 percent of respondents say that a report on book papers in the May 29, 1981, Publishers' Weekly influenced their thinking on acid-free paper or introduced the subject to them for the first time. Ten tables of data, four references, a summary of findings, lists of comments received, and a sample survey questionnaire and cover letter are provided. (Author/ESR)

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PUBLISHERS' OPINIONS ABOUT BOOK PAPER

Report of a Survey for

The Committee on Production Guidelines for Book Longevity

August, 1982

Council on Library Resources, Inc.
Washington, D.C.

IR050099

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Summary of Findings

1. Survey questionnaires were mailed to 437 U.S book publishers. A total of 111, or 25%, responded. On the basis of total sales, 26 of the respondents can be classed as large publishers; because many major companies did not respond, the Committee contacted ten selected firms for further information. Because university presses are easily identified, and form a category of publishers that sells primarily to libraries, they are frequently designated as a subgroup for analysis purposes in this report.

2. Seventy-two of the 111 respondents, or 65%, use acid-free paper for some or all of their books. Thirty-one of the 46 university press respondents (67%) report that they produce all hardback titles on acid-free paper. Thirteen other publishers, or 21% of the non-university press respondents, produce all hardback titles on acid-free paper. In general, publishers respond to the idea of using acid-free paper according to the kinds of books they publish.

3. Eighty-five percent (85%) of the university presses seriously consider preservation in their production decisions, but other publishers' responses divide more evenly among "seriously" (39%), "sometimes" (37%), and "never" (24%).

4. Only one-fourth of those responding reported using groundwood paper for their books.

5. For many publishers, expense is not the major reason for using or not using acid-free paper. Just over half the respondents (57%) consider it less expensive than other paper.

6. Three-fifths of the publishers (61%) indicate willingness to place a statement identifying acid-free paper on the copyright pages of their new books.

7. About one-third of the publishers (32%) say the report has influenced their thinking on the subject of acid-free paper, or has introduced the subject to them for the first time.

8. Many respondents added comments, two requested further information, and several expressed concern about book bindings as well as paper.

Publishers' Opinions About Book Paper

A questionnaire on publishers' use of acid-free paper was sent to two groups of publishing companies during the first week in January, 1982. The first group includes the 78 members of the Association of American University Presses. University presses are frequently designated as a subgroup for analysis purposes in this report because they form a class of publishers that sells primarily to libraries. The second group consists of 359 chief executives of American book publishing firms with a net worth of $500,000 or more. The following summary and analysis includes all responses received up to and including July 20, 1982. Because individual respondents were assured their replies would be considered confidential, no publishers' names are included in the report.

Table 1 provides summary data on questionnaire responses:

Table 1. Responses to Book Paper Questionnaire

	No. Questionnaires	%	No. Responses	Rate
University presses	78	18	46	59%
Other publishers	359	82	65	18%
Total	437	100%	111	25%

The overall response rate is extremely low, and the two categories of publishers are disproportionately represented in the responses. Nearly three-fifths of the university presses returned the questionnaire but less than one-fifth of the other publishing companies responded.

One way of assessing the respondents is to compare them to others in the industry. Because the survey was not sent to a sample of all U.S. publishers, the usual measures for assessing sample representation do not apply here. Neither can the findings be generalized to the industry as a whole. It is probable that the respondents are those most favorably inclined toward preservation in general.

One important consideration is whether the responses include the largest publishing houses. According to statistics compiled by the Association of American University Presses, there are 10 university presses that issue 100 or more titles every year. Six of the ten responded to the survey. For the other publishers, there is no single source listing title output. However, checking questionnaire responses against a list of publishers ranked by total sales reveals that 27, or over two-fifths of the 65 responses came from publishers that rank in the top 105. (News Front/Business Trends, 1980)

The U.S. Book Publishing Yearbook and Directory, 1981-82 includes a table of leading hardcover trade publishers ranked by sales for 1978-1980. Of the 12 publishers listed, 5 returned the questionnaire. Thus, two-thirds of the leading university preses and two-fifths of the leading trade book publishers responded--a response rate that is disappointingly low, particularly for the trade publishers. According to reports of earlier surveys, publishers have not usually responded well to attempts to gather information on their publishing practices. Fry and White, for example, in their study of scholarly journals, obtained a low 13.66% response rate from commercial publishers. (Fry and White, 1975; Kronick, 1982).

The low response rate probably indicates a general lack of publisher interest in the book longevity problem. Of those that responded, the majority have used acid-free stock to some extent, and have a considerable stake in the library market. Their interest in permanent paper and overall good record in using it undoubtedly biases the results of this survey.

Table 2 displays summary statistics on the number of hardback titles reported, the number of acid-free hardback titles, and the percentages for each set of respondents. University presses publish more acid-free books (in relation to the total number of titles) than other publishers. In fact, 31 of the 46 university press respondents (67%) say that they produce all their books on acid-free paper.

Table 2: Book Production

	Hardback titles/yr	Acid-free titles/yr	% Acid-free
University presses (n=46)	2,389	1,416	59
Other presses (n=56)	6,810	3,545	52
All presses	9,199	4,961	54%

The number of publications issued per year and the type of publications produced influence publisher use of acid-free paper (See Table 3). University presses that publish more than 30 titles per year also produce 86% of their books on permanent paper. Other publishers produce fewer books using permanent paper, although 13 companies noted that they always use acid-free or neutral paper.

Large publishers, in contrast to the large university presses, do not vary significantly in paper use. Inspection of the questionnaire returns suggests that among commercial publishers the type of publication issued is more important: for example, textbook publishers are less concerned about durable paper. Twelve respondents indicate that their firms publish primarily texts, popular works or paperbacks and use little or no acid-free paper. Table 3 displays a tally by publisher size.

Table 3. Production and Paper Use by Publisher Size*

	Hardback titles/yr	Acid-free titles/yr	% Acid-free
Univ. presses (over 30 titles; n=21)	1,487	1,286	86
Univ. presses (under 30 titles; n=25)	903	128	14
Univ. presses (over 100 titles; n=6)	648	608	94
Other presses (over 30 titles; n=28)	6,025	3,069	51
Other presses (100+ titles; n=15)	6,035	3,258	54
Large comm'l presses (n=38)	6,608	3,421	52

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*Several categories have been constructed for comparison purposes. Among university presses, the division has been made to include the top 50% in terms of number of titles published. The top six university presses are included as a separate category. Among other publishers, the division also is a production measure--the number of titles reported in survey responses. The "Large commercial presses" category is defined as publishers reporting over 30 titles plus publishers that appear on the previously cited lists of large publishers according to net worth and sales.

Most of the publishers do not carry their own paper inventories. Nearly two-thirds do not have a stock of acid-free paper, and many report some concern about the availability of permanent paper. At least 9 publishers commented about the availability problem. For example, "A problem is created when the printer supplies paper...we cannot control their purchases. There is a 50% possibility that printer supplied paper will be acid free." For the most part, it was the smaller presses that commented on the availability problem; however, one large university press noted that acid-free paper is not available locally. There was one comment to the effect that paper manufacturers ought to be required to publish the pH factor of the papers they produce.

Is Acid-Free Paper Considered?

Based on the types of books that the Committee's report suggests for preservation, it is not surprising to find that university presses are more inclined to use durable paper for their books--most of which fit into the categories listed there. More than four-fifths of the publishers in this group note that permanance is a serious consideration in their book specifications (see Table 4).

Table 4. Consideration of Permanent Paper*

	Univ. presses	Other presses	Total
Serious consideration	39 (85%)	25 (39%)	64 (59%)
Sometimes considered	6 (13%)	23 (37%)	29 (27%)
Not considered	1 (2%)	14 (24%)	15 (14%)
Total	46 (100%)	62 (100%)	108 (100%)

*In this and other tables, responses (in this case 108) do not equal total reponses (111) because some publishers did not answer all questions.

Overall, nearly three-fifths of the respondents indicate that permanence is a serious consideration. However, fewer of the non-university presses consider acid-free paper a priority in production decisions. Among the group of 38 of the largest nonuniversity presses, responses to this question also divide nearly evenly among the first two alternatives. However, 7 of the 38 indicated that paper durability is not a factor in their decisions. Three of the seven publish textbooks; one publishes popular paperbacks.

Use of Groundwood Paper

Relatively few of the respondents use groundwood paper for hardback books; one-tenth of university presses, and just over one-third of the other publishers reported using it (see Table 5). The title output they report amounts to 5% of the total number of titles reported. However, there is some evidence that a few respondents misread this question. Several reported using groundwood in paperbacks, although hardback books were specified. Others included their reasons for using groundwood. The most common were "frequently reused texts", "old paperbacks, just to keep the books available," and "regularly reprinted backlist titles."

Table 5. Use of Groundwood Paper

	Do use	Do not use	# GW titles	Total titles	% of titles
Univ. presses	5	40	*	*	*
Other presses	22	40	331	6,460	5%
Totals	27(25%)	80(75%)	*	*	*

*Most of the 5 reporting university presses did not include number of groundwood titles issued.

Is Acid-Free Paper More Expensive?

Table 6. Opinions on Cost of Acid-Free Paper

	Not more expensive	%	More expensive	%	Total
Univ. presses	29	69%	13	31%	42
Other presses	24	47%	27	53%	51
Total	53	57%	40	43%	93

Publishers as a whole divide rather evenly on the expense question, although university presses find that acid-free paper is more expensive. Respondents that do not believe that permanent paper is more expensive frequently noted that their printers carry it as normal stock or that the added expense is marginal when paper is purchased in carload lots. Two commented that the price differential is negligible "for our short run requirements and supply sources." However, another respondent said that her company would consider printing all titles on acid-free stock if it was available at a reasonable price; the company stocks its own supply of acid-free sheets for in-house printing but titles printed elsewhere are printed on the supplier's paper.

Those who now use acid-free paper generally noted that they do not consider it more expensive--and many added that expense is not a primary consideration in choosing an acid-free sheet. One publisher commented that he had believed acid-free papers more expensive until discovering that Glatfelter papers (not advertised previously as acid-free) are within his price range. Another reported: "Yes--in some grades and for some printing situations. For instance 35-40 lb. coated groundwood when available is less expensive and takes halftones better..." Opinions on expense do not vary significantly by company size: 53% of the 38 largest publishers indicate that acid-free paper costs more, as do 26% of the largest university presses.

A final comment came from a large U.S. publishing company that uses some acid-free paper, but for a minority of the new titles: "The availability of acid-free paper in increasing quantities from a larger number of mills will undoubtedly increase its use. But the high cost of paper will also drive us in the other direction, to some degree."

The Copyright Page Statement

Table 7 displays responses from the question on whether publishers would agree to place a statement identifying acid-free books on the copyright page of new titles printed on acid free paper.

Table 7. Attitudes on Acid-Free Paper Statement

	Univ. presses	%	Other presses	%	Total	%
No	18	41%	20	37%	38	39%
Yes	26	59%	34	63%	60	61%
Total	44	100%	54	100%	98	100%

Larger commercial presses do not differ greatly from presses as a whole in their willingness to add the statement. However, large university presses are more apt to agree to such a request (see Table 8)

Table 8. Attitudes on Acid-free Statement by Company Size

	Univ. preses (over 30 titles)	%	Large comm'l presses	%
No	3	15%	13	43%
Yes	17	85%	17	57%
Total	20	100%	30	100%

Publishers added a number of objections and/or qualifications to their answers:

--If other publishers agree to do so, or if it becomes standard industry practice. (2 respondents)
--If librarians really want it (1)
--Copyright page is already too full (3)
--Statement is too long (1)
--Must review idea to see whether the firm will agree to this (2)
--"I'm willing to include the acid free statement if we can ascertain that added sales or higher prices warrant its inclusion."
--"We might do it, but the guide line statement is vague. Some acid free papers are poor and some books printed on them fall apart for other reasons."
--Five presses responded that their acid-free titles already include a similar statement.

Influence of the Report and Publishers' Comments

Table 9. Influence of the Book Paper Report

	Univ. presses	%	Other presses	%	All presses	%
Has not influenced	29	69%	40	68%	69	68%
Has influenced	13	31%	19	32%	32	32%
Total	42	100%	59	100%	101	100%

There is essentially no difference between the two groups of publishers with regard to how much they believe the report has influenced their own attitudes. Over two-thirds have not been influenced--some because they cannot perceive that their businesses are affected, and others for reasons detailed below. However, nearly one-third of the respondents do feel that the report has influenced their attitudes and/or operations. Responses to the question are deceptive in that 16 individuals who checked "no" indicated that they chose that response because they have been aware of the problem for a long time. Some added that the report has reinforced their determination to use acid-free paper. Of those who checked "yes" several mentioned that they plan to obtain information concerning the price and availability of acid-free sheets when deciding on printing.

It is also important to assess the reactions of the largest publishers in each group. Table 10 below contains the relevant statistics.

Table 10. Influence of the Report: Largest Publishers' Opinions

	Univ. presses (Over 30 titles)	%	Large comm'l presses	%	All presses	%
Has not influenced	15	79%	27	77%	42	78%
Has influenced	4	21%	8	23%	12	22%
Total	19	100%	35	100%	54	100%

Large publishers have been less influenced by the report than the smaller companies. By and large, they are already converts to acid-free paper, or have decided that it is not appropriate for their books. Among those who noted that the report has been influential, 11 indicated that it reinforces their determination to use permanent paper or that they are encouraged by the publicity and concern on the subject. Those who were not previously acquainted with preservation concerns (4 respondents) note that they will consider acid-free paper in the future.

A final note received just as the last responses were being gathered provided an encouraging conclusion for the inquiry. The letter came from the director of a university press, who wished to add to his previous response:

"We have looked into the possibility of using this kind of paper, and have discovered a local source of supply. We will specify it's (sic) use in future publications as a matter of course. Now, wasn't that easy?

It's nice to think that the Council believes our publications contain information that anyone will want in future centuries."

Report prepared by Jane Rosenberg

Revised, with additions, August 2, 1982.

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Economics and Interaction of the Publisher-Library Relationship in the Production and Use of Scholarly and Research Journals. Washington, D.C., 1975.

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U.S. Book Publishing Directory and Yearbook, 1981-1982. New York, Facts on File, 1982.

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6. How do you decide which titles will be printed on acid-free paper?
The selected comments reproduced here have been chosen as representative of those received (1) or of interest because of their uniqueness (2).

(1)
Since our major customers are libraries, and we assume that all university press books are of lasting interest, we have all our hardback titles printed on Warrens or Glatfelder papers.

It's our policy to use acid free pH balanced papers and non starch filled binding cloths; the high cost of scholarly books deserves top quality materials.

Nearly all titles printed on acid-free paper. Only long run titles of an ephemeral nature may be done on other stock (of lower price and quality).

Retail price; usage; literary content; availability of paper; reason for publishing book.

We publish reference works and therefore try to always use acid-free paper.

(2)
We only stock two lots of paper. This paper was chosen because of other qualifications it met, not because it was acid-free. However, I am happy that it is acid-free also.

We use inventory supplied by the printer. We would not (in most cases) refuse to use the inventory solely because it was not acid-free. Though we might choose the printer with that consideration in mind. Obviously some titles which are expected to be long-lived must be on acid-free stock.

We have never used acid-free paper. In fact, until the Publisher's Weekly Report appeared, we had never heard of it.

Follow BMI specifications for text manufacturing. (From a textbook publisher that does not use acid-free paper.)

I chatted with one of the executives in production; they buy the paper. This exec says he does not consciously order acid free paper, but sometimes sees that designation on a shipment that comes in. Buyers, he says, are largely motivated by economics, and hunt for paper stocks that are bargains.

It's really a question of what consignment stock is available or if I have to supply the paper (some of the consignment stock is acid-free; when I supply stock, the opacity and brightness are the more important considerations per $.

Actually the paper mills we are currently using are either 100% acid-free or in the process of converting.

Generally we would like our books to last until they are paid for...and then the customer will buy another copy...hopefully.

All are to be printed on acid-free paper. Exceptions are rare and may be determined by such factors as the need for high-quality photo reproduction or blue-white stock not readily available from our traditionally low bidders for printing and binding.

GENERAL COMMENTS

General comments are reproduced below. As before, a "1" indicates a frequently made comment; a "2" indicates unusual or informative additions.

(1)
It reinforces our opinion that in the long run lower quality paper is a false economy.

No--we've been worried about the situation for years.

We'll be more aware of its availability. We'll watch for appropriate use.

(2)
An appropriate acid-free endsheet should also be used along with non-animal glues in the binding process.

In my opinion, the paper mills have us over a barrel - acid-free paper is very hard to get and unless purchased by the carload is very expensive - dealing direct with most mills is nearly impossible - they hold a monopoly and control how much of the paper is available.

We reached our decision to use acid-free paper after reading the article last summer. A friend is editor of the New England Quarterly here at Northeastern. He noted that older covers of his journal were deteriorating. Since we also use colored stock for our paperback covers and hardcover endsheets, we became interested in finding acid-free color stock. Our printer knows of only one company that produces such paper; they require very large orders, though. Can you suggest any other acid-free color paper suppliers?

The report has made us aware that paper manufacturers may change their policies in the future. This remains to be seen. Libraries have not consistently pushed their interest in acid-free paper, and hence it is very easy to ignore those requirements given the current economic pressure from all sides.

Our consciousness of problems caused by acidic paper has been high for many years, and we have always used neutral pH stock when we could. We are very much aware that availability at acceptable cost has greatly improved and have peen taking maximum advantage of this fact. I would suggest that trade paperbacks not be so casually excluded. Many libraries buy paperbound books and re-bind for archival use.

We are glad to know someone is watching the progress of getting the acid out of book paper, and we feel people are now coming together to think about it before they make a judgment and plan the printing of a book...We cannot afford to stock a special paperstock, which had been necesary until recently. It would mean using only one printer, and as we have to get three bids, it is not practical.

Cover board and endpaper stock also affect the pH of a book. Printers, board manufacturers, paper mills and binderies should be included in the studies.

It seems that an industry wide commitment by all paper manufacturers to produce only neutral pH publishing grades would solve the problem. I believe in attacking a problem as near to the source as possible.

With the rapid advance in video and digital storage systems it seems that in the next 25 years books lasting more than 10-20 years will become unnecessary, making acid-free paper less in demand than it is now.

It is no more expensive to produce an acid-free sheet - most good paper mills can do it - yet there are some who can't and don't plan to change. The more that publishers specify acid-free the greater the pressure for all mills to produce it. I feel sure most all quality trade publishing will become acid free in the near future.

Most manufacturers of book publishing grades intend to produce the acid-free sheets in the near future if they do not already. It does not cost more to produce this acid-free paper, in fact there should be greater efficiency in the process. There is however, and initial investment to convert. We intend to use quality papers which meet or exceed NASTA speces. The acid-free advantage is at this time an unintentional plus.

We feel that libraries should pay us a royalty on each circulation of one of our books. Until they do, we couldn't care less about their interest in our books lasting through the ages.

I was totally unaware of the subject, and, although we produce only paper bound, I will consider permanence and see that we take appropriate steps at once. Some of our materials are very permanent--they are paperbound because they are short. Thank you.

Libraries are an important segment of our market, so we try to please them.

Due to the limited number of mills manufacturing acid-free paper, publishers should be very selective specifying which titles should be printed on acid-free paper. If publishers are not selective and we experience shortage in supply there will not be adequate acid-free paper available to use on books that need preserving.

Call it a reawakening, but I don't expect to make major changes in purchasing. I will ask a few questions and would suppose that there will be some long term effect. Interesting that no paper salesman has pushed the acid-free concept to me for book use in many years. In some cases, I have need for real archival quality and then seek out neutral pH (not just acid-free) and sometimes all rag paper. But seeing the deterioration of some acid-free gloss coated in 10-15 years, personally I'm somewhat inclined to disregard your findings.

It is critically important that the books have a decent shelf life, since very few can be reprinted in even smaller numbers because of the extremely high cost for extremely small pressruns. If a book makes such an important contribution to the fund of knowledge in the world that it deserves to be published, it also deserves to stay around a while.

COUNCIL ON LIBRARY RESOURCES
One Dupont Circle • Washington, D.C. • 20036 Tel. 202-296-4757

January 4, 1982.

Dear Sir/Madam:

The physical deterioration of many books in the nation's libraries prompted the Council on Library Resources to establish the Committee on Production Guidelines for Book Longevity. Members concentrated first on the subject of book papers, and their report on this subject was published in the May 29, 1981, issue of Publishers' Weekly. A copy of this report is enclosed for your use, and for others in your company who may be interested.

We want now to follow up on the work of the Committee by asking you to provide us with the information requested on the enclosed brief questionnaire. We hope that, if it seems appropriate, you will consult with your production manager on some of the items. Please return the questionnaire promptly. We want to review responses beginning February 15, 1982.

Your reply will help the Committee to determine further action directed toward accomplishing what we hope is our commonly held goal--to assure that books of lasting intellectual importance are physically durable as well. Thank you for your assistance.

Sincerely yours,

Warren J. Haas
President

THE COMMITTEE ON PRODUCTION GUIDELINES FOR BOOK LONGEVITY

Herbert S. Bailey, Jr.(Chairman), Princeton University Press
Frank G. Burke, National Historical Publications and Records Commission
Warren J. Haas, Council on Library Resources, Inc.
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R. Gay Walker, Yale University Library

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January 4, 1982.

BOOK PAPER QUESTIONNAIRE

(The information provided by individual respondents will be kept confidential. Responses will be aggregated so as to preclude identification of individual publishers.)

1. Name of publishing company _____

   Name of person supplying information _____

2. Number of new hardback titles published per year _____

3. Number of adult hardback titles per year printed on acid-free paper _____

4. Does your company regularly carry an inventory of acid-free paper? _____

5. To what extent is paper permanence/durability a factor in specifying paper for your books?

   _____ A serious consideration

   _____ Sometimes a factor

   _____ Not a factor

6. How do you decide which titles will be printed on acid-free paper?

7. Are you using groundwood or partial groundwood paper in any hardback books?

   _____ No

   _____ Yes How many per year? _____

8. Do you consider acid-free paper more expensive than the paper you normally use in hardback books?

_____ No

_____ Yes

9. Are you willing to include a statement on acid-free paper on the copyright page of each new title, as suggested in the Report (see p. 5).

_____ No

_____ Yes

10. Has the enclosed Report affected your thinking on your policies related to paper usage?

_____ No

_____ Yes If so, how?

Please add comments and suggestions in the space below:

Thank you for your assistance. Please return this questionnaire in the enclosed envelope to the Council on Library Resources, Suite 620, One Dupont Circle N.W., Washington, D.C. 20036.